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An important part of this study is finding out what happens to the assets of our study participants after they are deceased. When we last talked with (you/NAME OF 1ST PROXY), part of (NAME'S) estate had not yet been settled. I have a few questions about the final disposition of (his/her) estate which will only take a few minutes of your time.

N1 BRANCHPOINT

PREMARKED

<p>Γ 1. R OWNED HOME AT TIME OF DEATH</p> <p>Γ 2. ALL OTHERS ----> GO TO N6X BRANCHPOINT, PAGE 6</p>

[Q2315]

N1x. Our records show that (he/she) owned a home at the time (he/she) died.

Please, let me confirm, did (he/she) still own that home when (he/she) died?

1.YES	5.NO	8.DK	9.RF	7. R DISPUTES RECORD
GO TO N3x PAGE 3		GO TO N6x BRANCHPOINT PAGE 6		

[Q2316]

N1ax. What happened to that home -- did (he/she) sell it, give it to someone, or what?

1.GAVE TO SOMEONE	2.SOLD	7.OTHER	8.DK	9.RF
	GO TO N2x PAGE 2	GO TO N6x BRANCHPOINT PAGE 6		

[Q2317]

N1bx. To whom did (he/she) give the house, that is, what was their relationship to (him/her)?

CHECK ALL THAT APPLY

2. CHILD/ CHILD-IN-LAW GRANDCHILD	3.OTHER RELATIVE	4. FRIEND	5. CHARITY	7. SOMEONE ELSE	8. DK	9. RF
GO TO N1cx PAGE 2	GO TO N6x BRANCHPOINT PAGE 6					

IWER: IF "CHILD" ALSO MARKED, ENTER NAMES AT N1cx.

[Q2318]

N1cx. Which child is that?

LIST ALL CHILDREN MENTIONED

IF GRANDCHILD: Which child of (his/hers) is the parent of that grandchild?

CHILD NAME _____ CHILD NAME _____

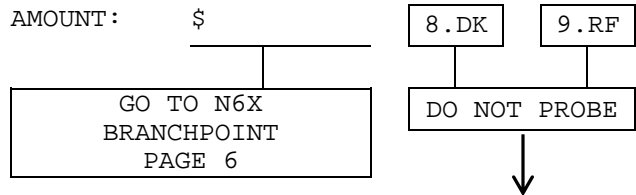
CHILD NAME _____ CHILD NAME _____

CHILD NAME _____ CHILD NAME _____

GO TO N6X BRANCHPOINT
PAGE 6

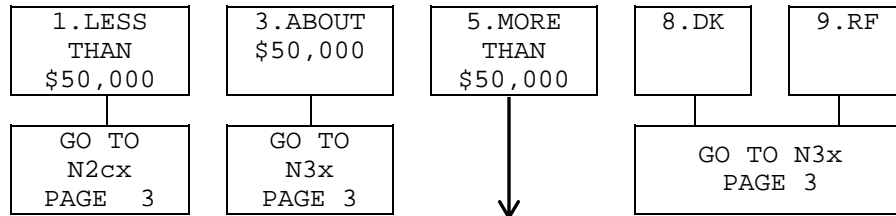
[Q2327]

N2x. What was the selling price?



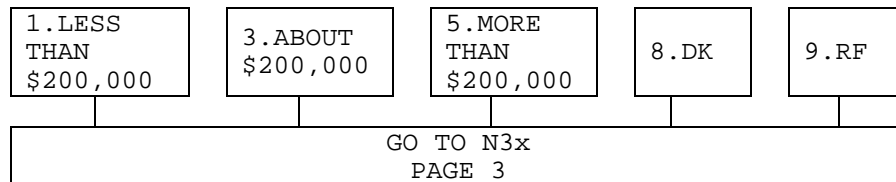
[Q2328]

N2ax. Did it amount to less than \$50,000, more than \$50,000, or what?



[Q2329]

N2bx. (Did it amount to) less than \$200,000, more than \$200,000, or what?



PAGE 3

[Q2330]

N2cx. (Did it amount to) less than \$15,000, more than \$15,000, or what?

1.LESS THAN \$15,000	3.ABOUT \$15,000	5.MORE THAN \$15,000	8.DK	9.RF
GO TO N6x BRANCHPOINT PAGE 6				

[Q2335]

N3x. IF SURVIVING SPOUSE IS PROXY

What happened to that home after (his/her) death: Do you own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

IF SURVIVING SPOUSE IS NOT PROXY

What happened to that home after (his/her) death: Does (his/her) (husband/wife/partner) own it now, was it sold, was it inherited by someone else, has it not yet been disposed of, or what?

1.SURVIVING SPOUSE STILL OWNS IT	2.SOLD	3. INHERITED	4.NOT YET DISPOSED	7. OTHER SPECIFY:	8.DK	9.RF			
GO TO N6X BRANCHPOINT PAGE 6	GO TO N4X PAGE 4	↓	GO TO N5X PAGE 5		GO TO N6X BRANCHPOINT PAGE 6				
<table border="1" style="width: 100%; height: 40px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									
GO TO N6x BRANCHPOINT PAGE 6									

[Q2336]

N3ax. Who inherited the house, that is, what was their relationship to (him/her)?

CHECK ALL THAT APPLY

2. CHILD/ CHILD-IN-LAW GRANDCHILD	3.OTHER RELATIVE	4. FRIEND	5. CHARITY	7. SOMEONE ELSE	8. DK	9. RF
GO TO N3bx NEXT PAGE	GO TO N6X BRANCHPOINT PAGE 6					

IWER: IF "CHILD" ALSO MARKED, ENTER NAMES AT N3bx.

PAGE 4

[Q2337]

N3bx. Which child is that?
LIST ALL CHILDREN MENTIONED

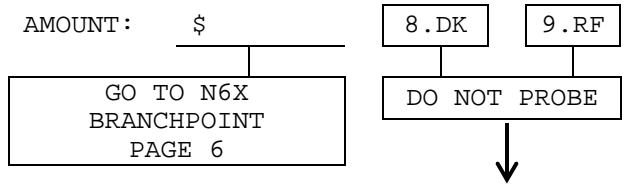
IF GRANDCHILD: Which child of (his/hers) is the parent of that grandchild?

CHILD NAME _____	CHILD NAME _____
CHILD NAME _____	CHILD NAME _____
CHILD NAME _____	CHILD NAME _____

GO TO N6x BRANCHPOINT
PAGE 6

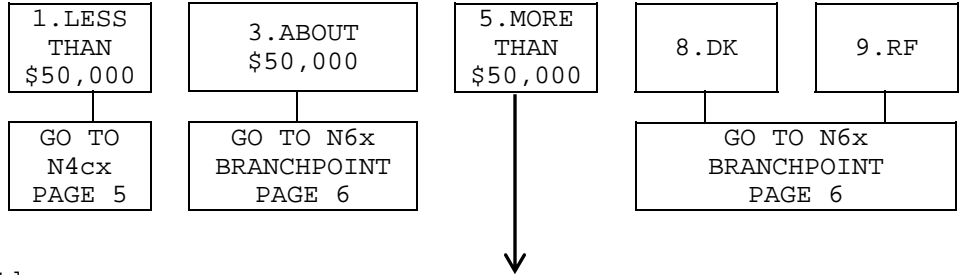
[Q2339]

N4x. What was the selling price?



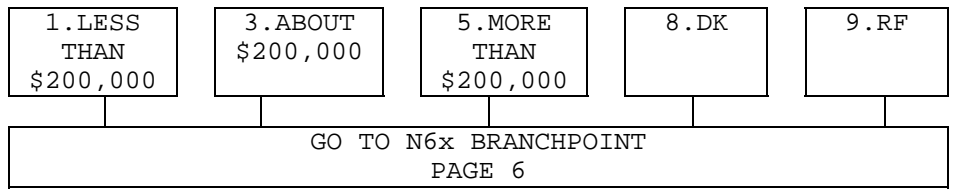
[Q2340]

N4ax. Did it amount to less than \$50,000, more than \$50,000, or what?



[Q2341]

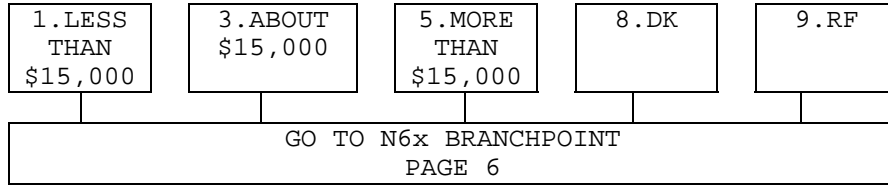
N4bx. (Did it amount to) less than \$200,000, more than \$200,000, or what?



PAGE 5

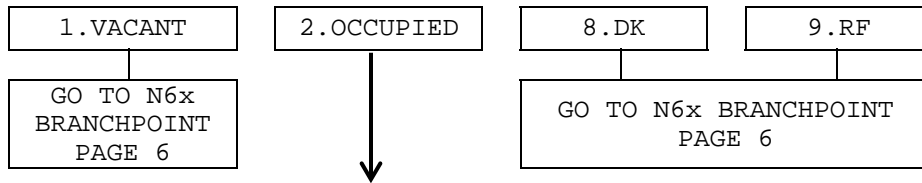
[Q2342]

N4cx. (Did it amount to) less than \$15,000, more than \$15,000, or what?



[Q2343]

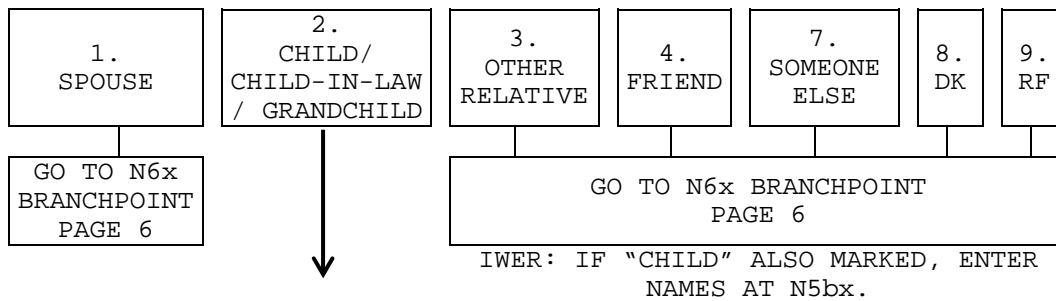
N5x. Is that home now vacant, or is someone living there?



[Q2344]

N5ax. Who lives in the house, (that is, what was their relationship to (him/her))?

CHECK ALL THAT APPLY



[Q2346]

N5bx. Which child is that?

LIST ALL CHILDREN MENTIONED

IF GRANDCHILD: Which child of (his/hers) is the parent of that grandchild?

CHILD NAME _____	CHILD NAME _____
CHILD NAME _____	CHILD NAME _____
CHILD NAME _____	CHILD NAME _____

N6X BRANCH POINT

PREMARKED

I R ONLY HAD A HOME TO ASK ABOUT ----> GO TO END, PAGE 23

I ALL OTHERS
↓

N71x. Sometimes people make provision to leave things to specific family members if something happens to them, others do not. Because we are trying to get a complete picture of family situations, I have a few questions about inheritance.

Before (NAME)'s death, had (he/she) put any of (his/her)assets into a trust?

1.YES	5.NO	8.DK	9.RF
-------	------	------	------

[Q2419]

N72x. In addition to the trust, did (NAME) have a will that was written and witnessed?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N73x PAGE 7		

[Q2420]

N72ax. Has (NAME)'s will been probated?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N73x PAGE 7		

[Q2421]

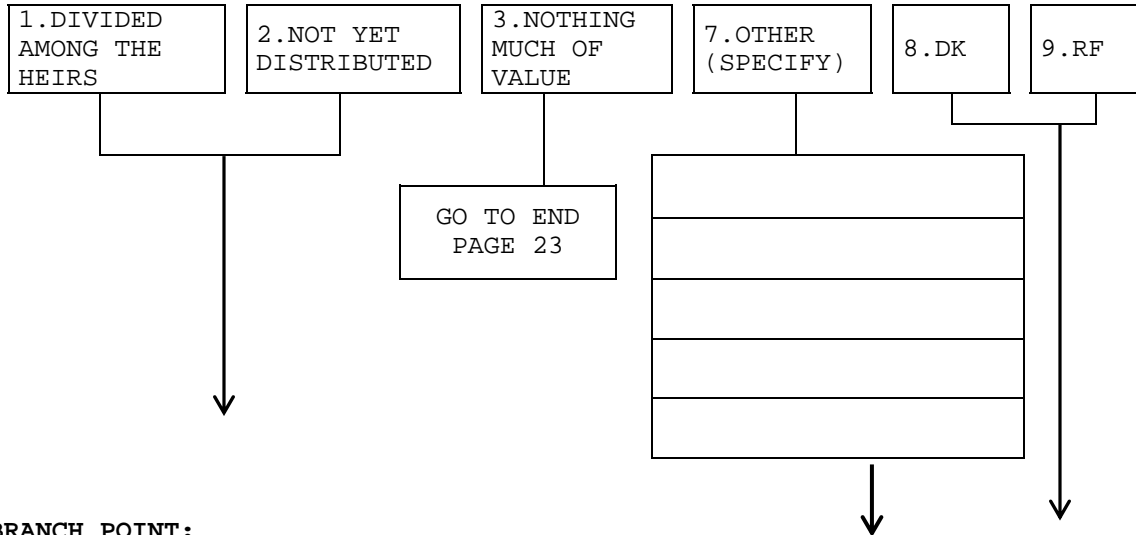
N72bx. In what county and state was it probated?

COUNTY: _____

STATE: _____

[Q2423]

N73x. What happened to (his/her) assets and possessions: have they been divided among the heirs, have they not yet been distributed, was there nothing of much value to distribute, or what?



N74X BRANCH POINT:

REFER TO N71x, N72x, AND N72ax ON PREVIOUS PAGE AND N73x ABOVE

- Γ 1. DECEASED R'S WILL NOT YET PROBATED ----> GO TO END, PAGE 23
(N72ax=N0)
- Γ 2. R HAD NO WILL AND NO TRUST, ----> GO TO N83xx, PAGE 23
(N71x=N0 AND N72X=NO)
- Γ 3. ALL OTHERS

N74xx: FILL INSTRUCTIONS FOR N74x, N75x, N77x, N79x, N80x, N81x

- Γ R HAD A WILL BUT NO TRUST: READ "will"
- Γ R HAD A WILL AND A TRUST: READ "will or trust"
- Γ R HAD A TRUST ONLY: READ "trust"

N74x2 BRANCH POINT

PREMARKED

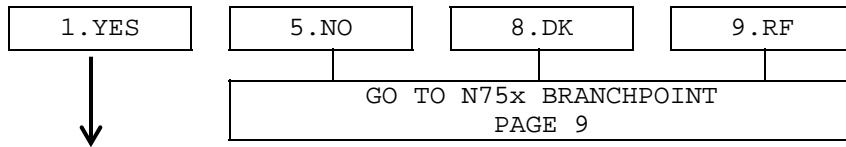
- Γ R WAS NOT MARRIED/PARTNERED AT TIME OF DEATH -> GO TO N75x, PAGE 9
- Γ 2. R WAS MARRIED AT TIME OF DEATH
 - Γ 3. R WAS PARTNERED AT TIME OF DEATH

CONTINUE WITH N74x, NEXT PAGE

PAGE 8

[Q2425]

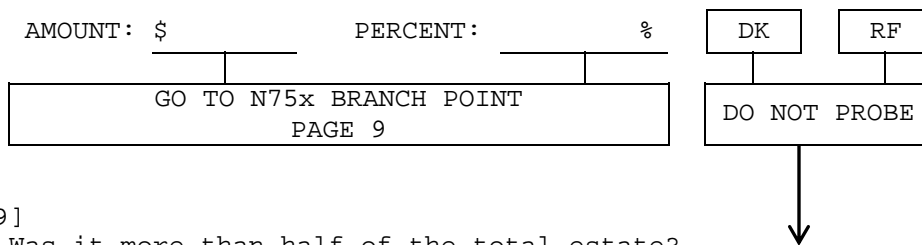
N74x. Did (NAME) make provisions in the (will/will or trust/trust) for (you)(SPOUSE/PARTNER NAME)?



[Q2426]

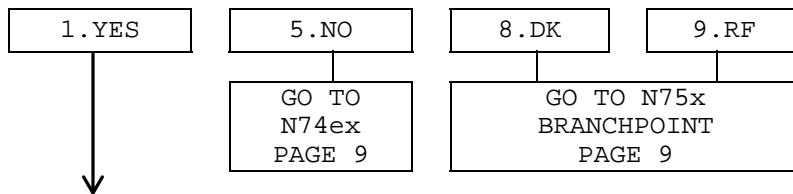
N74ax. How much did (you/his wife/her husband/the partner) receive from the estate?

ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE



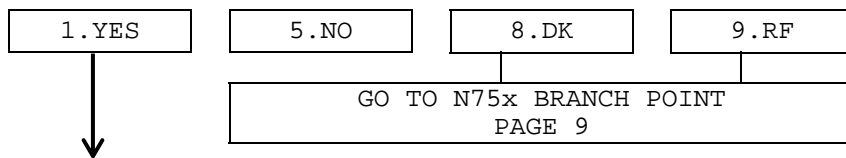
[Q2429]

N74bx. Was it more than half of the total estate?



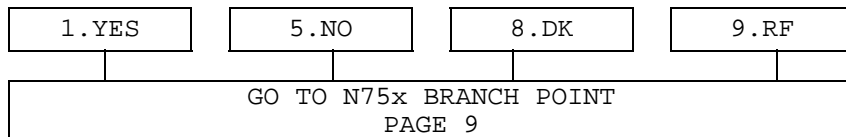
[Q2430]

N74cx. Was it more than 75 percent of the total estate?



[Q2431]

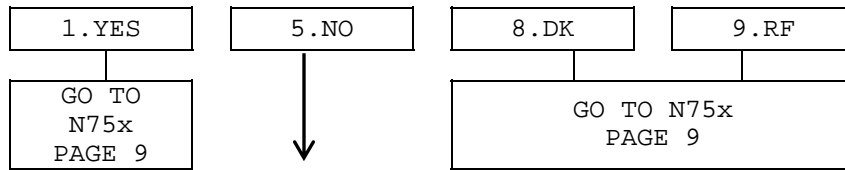
N74dx. Was it more than 90 percent of the total estate?



PAGE 9

[Q2432]

N74ex. Was it more than 25 percent of the total estate?



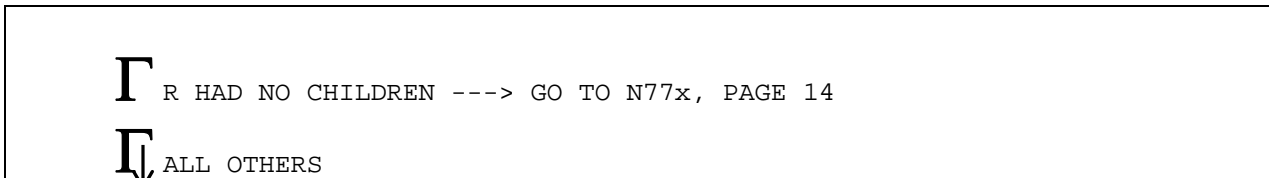
[Q2433]

N74fx. Was it more than 10 percent of the total estate?



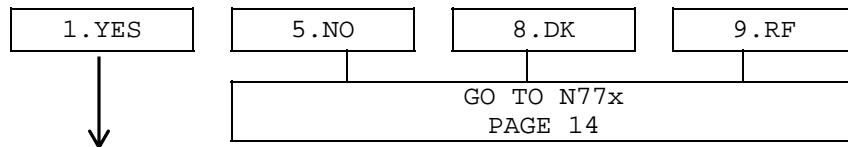
N75x BRANCH POINT

PREMARKED



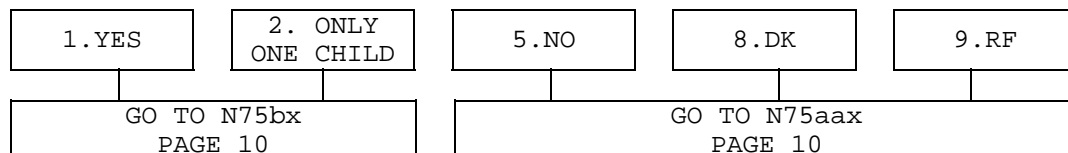
[Q2434]

N75x. Did (NAME) make provisions in the (will/will or trust/trust) for any of (his/her) children (or grandchildren (or great-grandchildren))?
IWER: PLEASE RECORD ANY INFORMATION ABOUT ULTIMATE BENEFICIARIES IN MARGINAL NOTES.



[Q2435]

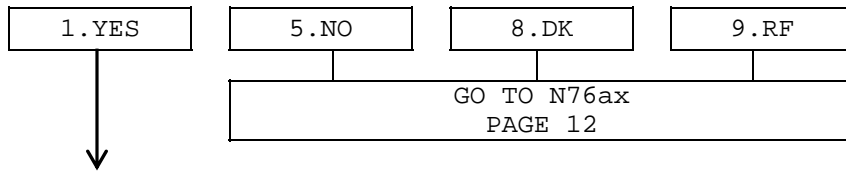
N75ax. Did (NAME) provide equally for all of (his/her) children and their families?



PAGE 10

[Q2436]

N75aax.Did (NAME)leave the same amount to each of (his/her) grandchildren?

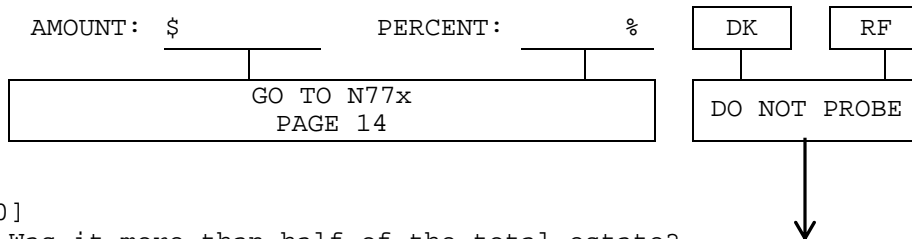


[Q2437]

N75bx.Altogether, how much did (he/she)leave for (his/her) child(ren) (grandchild(ren))?

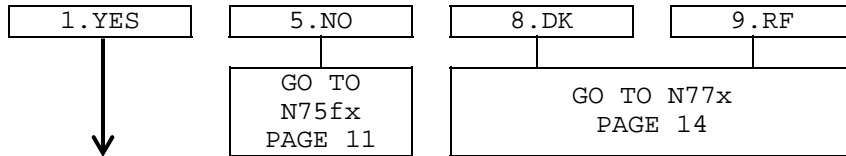
IWER: ENTER EITHER A DOLLAR AMOUNT OR A PERCENTAGE

ENTER 0 IN THE AMOUNT FIELD IF THE CHILDREN WILL RECEIVE THE ASSETS LATER.



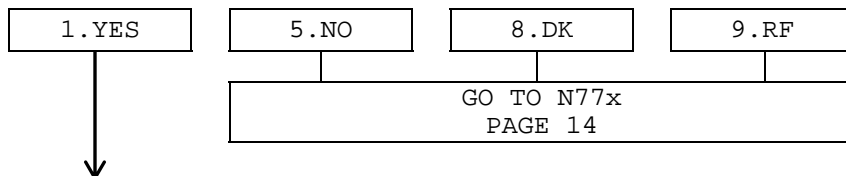
[Q2440]

N75cx.Was it more than half of the total estate?



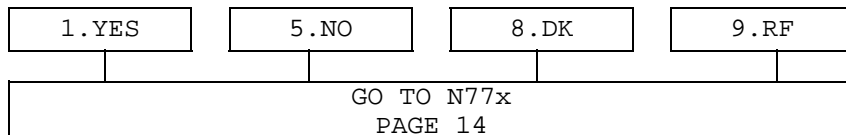
[Q2441]

N75dx.Was it more than 75 percent of the total estate?



[Q2442]

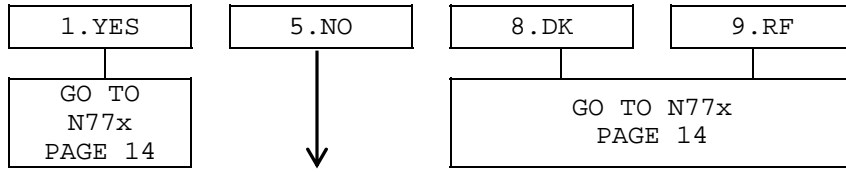
N75ex.Was it more than 90 percent of the total estate?



PAGE 11

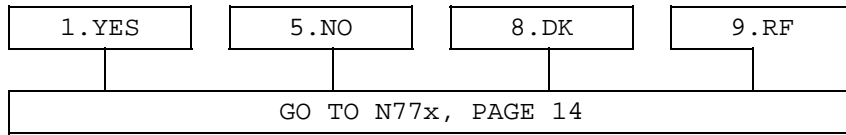
[Q2443]

N75fx. Was it more than 25 percent of the total estate?



[Q2444]

N75gx. Was it more than 10 percent of the total estate?



INSTRUCTIONS FOR CHILD BENEFICIARY INFORMATION:

SAY "Please tell me which children received part of the estate " AND RECORD NAME AND AMOUNT OR PERCENT FOR EACH CHILD MENTIONED. AFTER DATA ON ALL CHILDREN HAS BEEN RECORDED, CONTINUE WITH N77X, PAGE 14.

	Q2447 N76ax.	Q2451 N76bx.	Q2452 N76cx.	Q2453 N76dx.	Q2454 N76ex.	Q2455 N76fx.
Name RECORD NAMES OF CHILDREN	How much did (NAME) leave for (CHILD) and (his/her) family? ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE	Was it more than half of (NAME) total estate?	Was it more than 75 percent of (NAME) total estate?	Was it more than 90 percent of (NAME) total estate?	Was it more than 25 percent of (NAME) total estate?	Was it more than 10 percent of (NAME) total estate?
CHILD NAME FIRST LAST	AMOUNT \$ _____ PERCENT _____ % 8. DK 9. RF	1. YES → 5. NO GO TO N76ex 8. DK 9. RF	1. YES → 5. NO 8. DK 9. RF	1. YES → 5. NO 8. DK 9. RF	1. YES → 5. NO → 8. DK 9. RF	1. YES → 5. NO → 8. DK 9. RF
	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD
CHILD NAME FIRST LAST	AMOUNT \$ _____ PERCENT _____ % 8. DK 9. RF	1. YES → 5. NO GO TO N76ex 8. DK 9. RF	1. YES → 5. NO 8. DK 9. RF	1. YES → 5. NO 8. DK 9. RF	1. YES → 5. NO → 8. DK 9. RF	1. YES → 5. NO → 8. DK 9. RF
	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD
CHILD NAME FIRST LAST	AMOUNT \$ _____ PERCENT _____ % 8. DK 9. RF	1. YES → 5. NO GO TO N76ex 8. DK 9. RF	1. YES → 5. NO 8. DK 9. RF	1. YES → 5. NO 8. DK 9. RF	1. YES → 5. NO → 8. DK 9. RF	1. YES → 5. NO → 8. DK 9. RF
	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD

NEXT PAGE

	N76ax.	N76bx.	N76cx.	N76dx.	N76ex.	N76fx.
Name RECORD NAMES OF CHILDREN	How much did (NAME) leave for (CHILD) and (his/her) family? ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE	Was it more than half of (NAME) total estate?	Was it more than 75 percent of (NAME) total estate?	Was it more than 90 percent of (NAME) total estate?	Was it more than 25 percent of (NAME) total estate?	Was it more than 10 percent of (NAME) total estate?
CHILD NAME FIRST LAST	AMOUNT \$ _____ PERCENT _____ % 8. DK 9. RF	1. YES 5. NO GO TO N76ex 8. DK 9. RF	1. YES 5. NO 8. DK 9. RF	1. YES 5. NO 8. DK 9. RF	1. YES 5. NO 8. DK 9. RF	1. YES 5. NO 8. DK 9. RF
	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD	NEXT CHILD
CHILD NAME FIRST LAST	AMOUNT \$ _____ PERCENT _____ % 8. DK 9. RF	1. YES 5. NO GO TO N76ex 8. DK 9. RF	1. YES 5. NO 8. DK 9. RF	1. YES 5. NO 8. DK 9. RF	1. YES 5. NO 8. DK 9. RF	1. YES 5. NO 8. DK 9. RF

CONTINUE WITH N77x, NEXT PAGE

PAGE 14

[Q2458]

N77x. Did (NAME) make provisions in the (will/will or trust/trust) for charities?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N78x PAGE 15		

[Q2459]

N77ax.How much did charities receive from the estate?

ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE

AMOUNT: \$ _____	PERCENT: _____ %	DK	RF
GO TO N78x PAGE 15		DO NOT PROBE	
		↓	

[Q2462]

N77bx.Was it more than half of the total estate?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N77ex PAGE 15	GO TO N78x PAGE 15	

[Q2463]

N77cx.Was it more than 75 percent of the total estate?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N78x PAGE 15		

[Q2464]

N77dx.Was it more than 90 percent of the total estate?

1.YES	5.NO	8.DK	9.RF
GO TO N78x PAGE 15			

PAGE 15

[Q2465]

N77ex. Was it more than 25 percent of the total estate?

1.YES	5.NO	8.DK	9.RF
GO TO N78x PAGE 15	↓	GO TO N78x PAGE 15	

[Q2466]

N77f. Was it more than 10 percent of the total estate?

1.YES	5.NO	8.DK	9.RF
-------	------	------	------

[Q2468]

N78x. Did (NAME) make provisions in the (will/will or trust/trust) for any of (his/her) brothers or sisters?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N79x PAGE 16		

[Q2469]

N78ax. Altogether, how much did (his/her) brothers and sisters receive from the estate?
ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE

AMOUNT: \$ _____	PERCENT: _____ %	DK	RF
GO TO N79x Page 16		DO NOT PROBE	
		↓	

[Q2462]

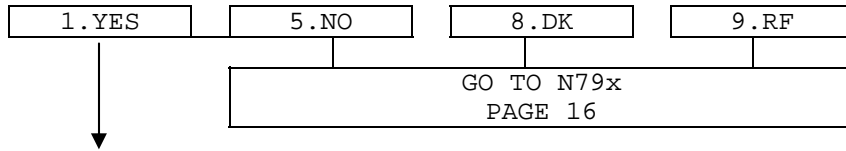
N78bx. Was it more than half of (his/her) total estate?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N78ex PAGE 16	GO TO N79x PAGE 16	

PAGE 16

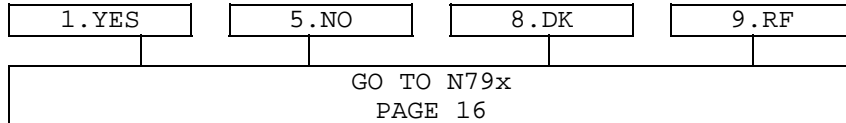
[Q2463]

N78cx.Was it more than 75 percent of (his/her) total estate?



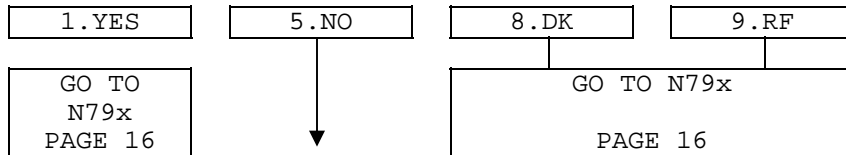
[Q2464]

N78dx.Was it more than 90 percent of (his/her) total estate?



[Q2465]

N78ex.Was it more than 25 percent of (his/her) total estate?



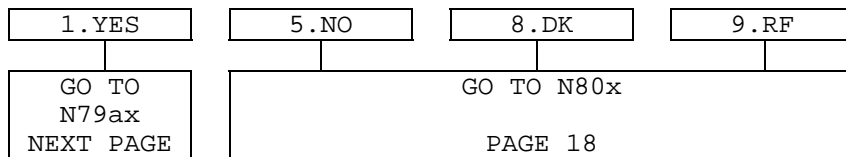
[Q2466]

N78fx.Was it more than 10 percent of (his/her) total estate?



[Q2478]

N79x.Did (NAME)make provisions in the (will/will or trust/trust) for any other of (his/her) relatives?



PAGE 17

[Q2479]

N79ax. Altogether, how much did these other relatives receive from (his/her) estate?
ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE

AMOUNT: \$ _____	PERCENT: _____ %	DK	RF
GO TO N80x PAGE 18		DO NOT PROBE	
		↓	

[Q2462]

N79bx. Was it more than half of (his/her) total estate?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N79ex PAGE 17		

[Q2463]

N79cx. Was it more than 75 percent of (his/her) total estate?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N80x PAGE 18		

[Q2464]

N79dx. Was it more than 90 percent of (his/her) total estate?

1.YES	5.NO	8.DK	9.RF
GO TO N80x PAGE 18			

[Q2465]

N79ex. Was it more than 25 percent of (his/her) total estate?

1.YES	5.NO	8.DK	9.RF
GO TO N80x PAGE 18	↓	GO TO N80x PAGE 18	

[Q2466]

N79fx. Was it more than 10 percent of (his/her) total estate?

1.YES	5.NO	8.DK	9.RF
-------	------	------	------

PAGE 18

[Q2488]

N80x. Did (NAME) make provisions in (will/will or trust/trust) for any of (his/her) friends?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N81x PAGE 19		

[Q2489]

N80ax. Altogether, how much did (NAME)'s friends receive from (his/her) estate?
ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE

AMOUNT: \$	PERCENT: %	DK	RF
GO TO N81x PAGE 19		DO NOT PROBE	
		↓	

[Q2462]

N80bx. Was it more than half of (his/her) total estate?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N80ex PAGE 19	GO TO N81x PAGE 19	

[Q2463]

N80cx. Was it more than 75 percent of (his/her) total estate?

1.YES	5.NO	8.DK	9.RF
↓	GO TO N81x PAGE 19		

[Q2464]

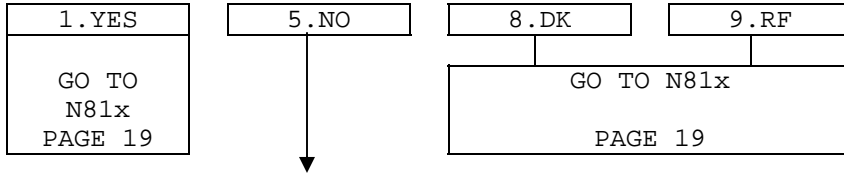
N80dx. Was it more than 90 percent of (his/her) total estate?

1.YES	5.NO	8.DK	9.RF
GO TO N81x PAGE 19			

PAGE 19

[Q2465]

N80ex. Was it more than 25 percent of (his/her) total estate?



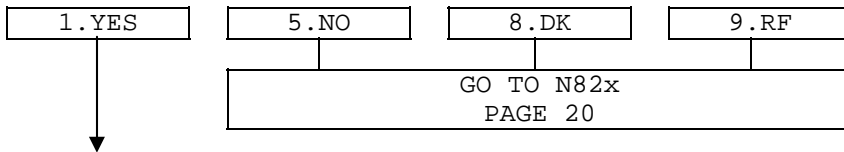
[Q2466]

N80fx. Was it more than 10 percent of (his/her) total estate?



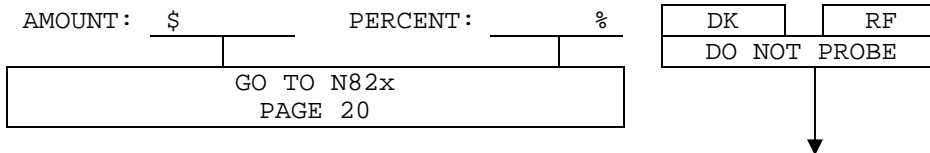
[Q2498]

N81x. Did (NAME) make provisions in (will/will or trust/trust) for anyone else or anything else that we have not yet listed?



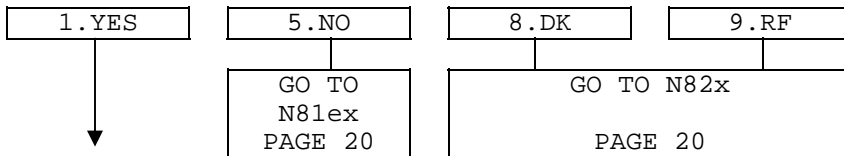
[Q2499]

N81ax. Altogether, how much did those others receive from (NAME)'s estate?
ACCEPT EITHER A DOLLAR AMOUNT OR A PERCENTAGE



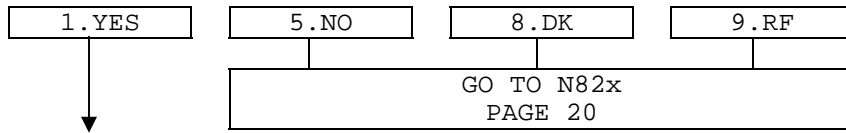
[Q2462]

N81bx. Was it more than half of (his/her) total estate?

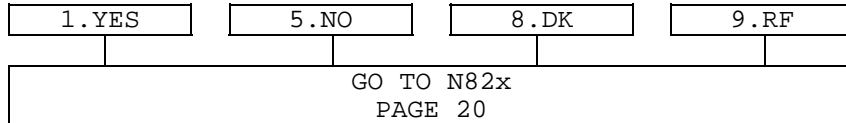


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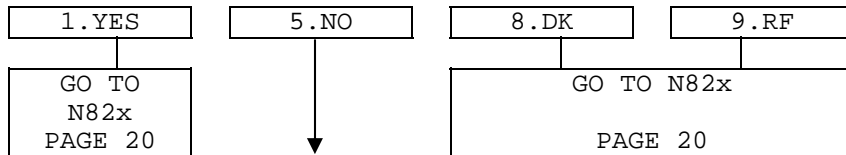
[Q2463]
N81cx. Was it more than 75 percent of (his/her) total estate?



[Q2464]
N81dx. Was it more than 90 percent of (his/her) total estate?



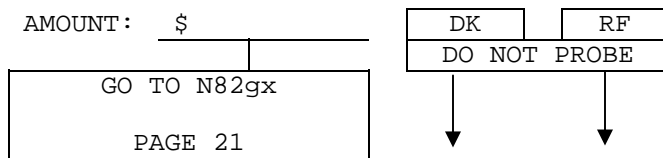
[Q2465]
N81ex. Was it more than 25 percent of (his/her) total estate?



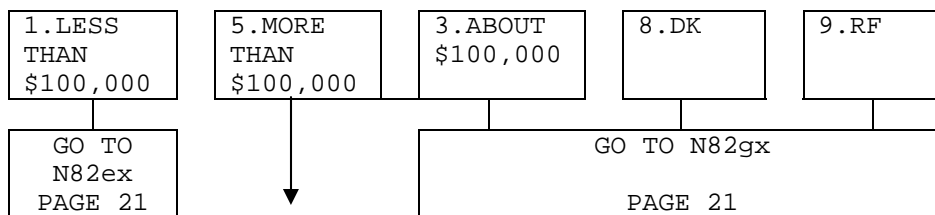
[Q2466]
N81fx. Was it more than 10 percent of (his/her) total estate?



N82x. Altogether, what was the value of (his/her) total estate?

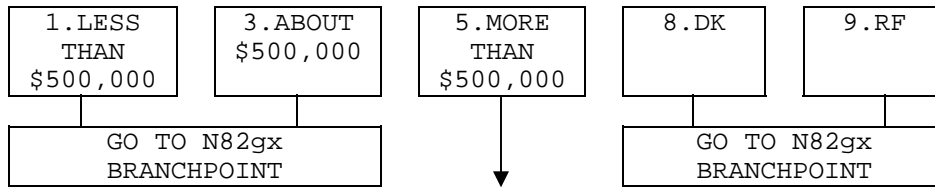


[Q2508]
N82bx. Did it amount to less than \$100,000, more than \$100,000, or what?



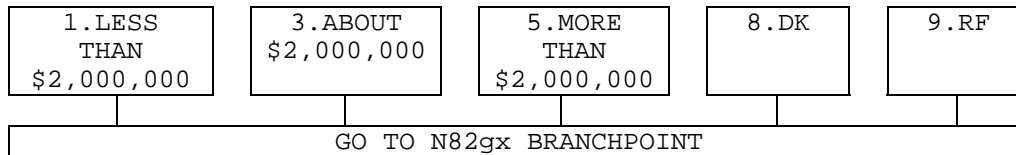
[Q2509]

N82cx.Did it amount to less than \$500,000, more than \$500,000,or what?



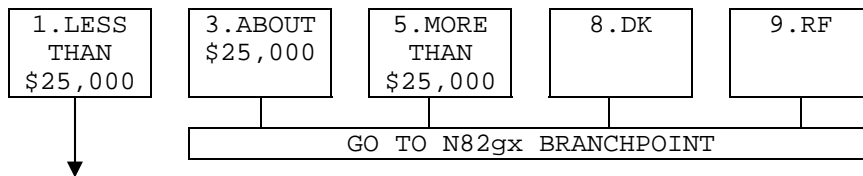
[Q2510]

N82dx.Did it amount to less than \$2,000,000, more than \$2,000,000,or what?



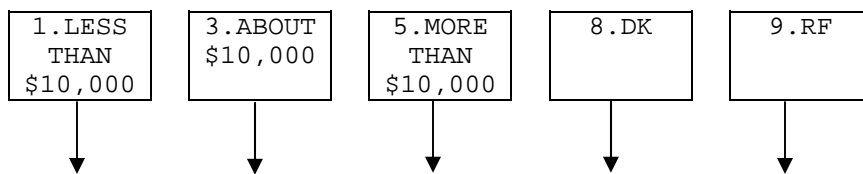
[Q2511]

N82ex.Did it amount to less than \$25,000, more than \$25,000,or what?



[Q2512]

N82fx.Did it amount to less than \$10,000, more than \$10,000,or what?



N82gx BRANCH POINT

REFER TO N71X PAGE 6

Γ R HAD A TRUST ---> GO TO N82gx2 NEXT PAGE

Γ ALL OTHERS

CONTINUE WITH N82gx1, NEXT PAGE

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[2513]

N82gx1. Was any part of (NAME)'s estate put into a trust after (he/she) died?

1.YES	5.NO	8.DK	9.RF
GO TO N82hx	GO TO "END" PAGE 23		

N82gx2. Is any part of (NAME)'s estate still held in any type of a trust?

1.YES	5.NO	8.DK	9.RF
↓	GO TO "END" PAGE 23		

[Q2514]

N82hx. Who is currently the trustee of this trust?
CHECK ALL THAT APPLY

1. SPOUSE	2. CHILD	3. OTHER RELATIVE	4. ATTORNEY	5. BANK OFFICER TRUST DEPARTMENT AT A BANK	7. OTHER SPECIFY	8. DK	9. RF
GO TO "END" PAGE 23	↓	GO TO "END" PAGE 23					

[Q2515]

N82jx. Which child is that?

LIST ALL CHILDREN MENTIONED

CHILD NAME _____ CHILD NAME _____

CHILD NAME _____ CHILD NAME _____

CHILD NAME _____ CHILD NAME _____

GO TO "END" PAGE 23

PAGE 23

N83xx. Please give me any information you can about how (NAME)'s possessions were distributed.

Γ IWER: CHECK HERE IF NOT YET DISTRIBUTED

END: We want to thank you very much for your time and help in providing this additional information about (NAME).

THUMBNAIL
